

We are delighted to launch billing version 3.7, which has been a long time in coming. Please take the time to look through this document, as there are many new features, which will either;

- a. be subtle, and perhaps not obvious
- b. be obvious, but perhaps not entirely intuitive
- c. be very useful (we hope)
- d. make you yawn (we hope not)

We will also be scheduling some user 'training groups' in the days after the launch, and we suggest you sign up for one of these to learn how to get the most out of some of the larger new features

## Patient Transaction History

### History of accounts viewed

1. History of patient accounts viewed during your login – you can click the drop down to see an alphabetical list, or use the [<] and [>] buttons to scroll forward or back

2. Show Details – click the checkbox to show details below for a selected claim, and activate the search filters

3. Search filters – have you ever had a patient call about their account and say “I paid you \$50 last month” – you can enter the check number, and/or amount, and refresh. This will narrow down the claims to those with a match on that check number and amount. You can also narrow down the claim list for only those with an insurance payment, or workers comp payment, and so on.

## Patient Statements

We now have two buttons for statement on the history form

### Itemized Statement

Will open an itemized statement report

### View Statement

Select a statement line and click, or double click the statement line, to will bring up a pdf view of the patient’s old statement, as sent on that date.

At the bottom of this page you have the option to print an image of the old statement.

To create a new current statement, get started by clicking the refresh button.

DATE	LINE	DESCRIPTION	CHARGE	PAID	REMAINING	AMOUNT	STATUS	REMARKS
04/05/2008	9140	CHRG VENDOR SERVICE	\$100.00	\$100.00	\$0.00	\$0.00	PAID	
04/05/2008	9141	CHRG VENDOR SERVICE	\$100.00	\$100.00	\$0.00	\$0.00	PAID	

## Posting account corrections in the claim history

We have a brand new set of toys in store for you. Open the claim transaction detail form, and click any charge or transaction line in the history and you will see some new fields open at the bottom.

Claim ID: 1668970

Patient Name (A/C#): MOONSTRUCK, LORETTA (MJ1053)

Total OS Bal: \$1,200.00  
 Patient: \$1,200.00 Ins: \$0.00 Indus A/C: \$0.00  
 Collections OS: \$0.00 Collections W/O: \$0.00  
 Unapplied Ins pmts: \$0.00 Unapplied Pat pmts: \$0.00

Claim ID	Charged	Ins Paid	Pt Paid	Adjusted	Balance	Description	Debtor	Provider
1668970	\$1,200.00				\$1,200.00	Claim - Billed to Patient	MOONSTRUCK, LORETTA	SARBANES, MICHAEL

DOS	Claim ID	CPT	Posting Date	DR	CR	Balance	Description	Debtor	Batch	Reference	Date Rec'd	Remarks
05/06/2008	1668970	00918	06/22/2008			\$975.00	RETURN MAIL AT 804 N 46TH ST GROVE, HA...	MOONSTRUCK, LORETTA				
05/06/2008	1668970	99140	05/12/2008	\$225.00		\$225.00	ANESTH, STONE REMOVAL	MOONSTRUCK, LORETTA				
							EMERGENCY ANESTHESIA	MOONSTRUCK, LORETTA				

Debtor: Patient Transaction: Transaction: Amount: Unapplied Pmts

Remarks: Add to Preview Save and Commit

Posted: Adjustments: \$0.00 Refunds: \$0.00 Payments: \$0.00

Save to new system assigned batch Save to user batch:

You can now post payments, corrections, etc to the claim using the history form. All of this will add data to the accounting system, subject to the usual accounting rules. Any payment or adjustment changes made will reflect as 'offsetting' transactions, and can be added to a new or existing batch of your choice. However, if you post changes to those pesky 'allowed' or 'patient responsible' amounts, those will just update, as those amounts are not relevant to your accounting month-end totals.

### Some detail:

If you need to change a payment or adjustment, click that line, to pull the detail in below to modify. To add something new, click the charge line, which will give you a new blank slate.

Debtor: Patient Transaction: Transaction: Amount: Unapplied Pmts

Remarks: Add to Preview Save and Commit

Posted: Adjustments: \$0.00 Refunds: \$0.00 Payments: \$0.00

Save to new system assigned batch Save to user batch:

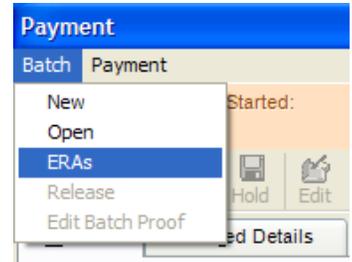
### Notable notes

1. For any changes or additions, be sure to pick the correct debtor. This is important to ensure accurate reports, and even more important if you expect a secondary claim to go electronically – the new EDI secondary claim rules are very fussy as you may know.
2. Before saving any changes, decide what 'batch mode' you prefer. If you don't need your changes in any particular batch, select 'system assigned', otherwise select 'user batch'. These settings will be saved as your preferences each time you return – you can always change them at any point in the future.
3. When you have added your debtor, transaction and amount it is recommended to first click the 'Add to Preview' button. This will show your changes on the history form, but not save them. You will then also see an 'Undo' button which may come in handy if you don't like the result and want to try again.
4. When you are done, click Save and Commit. Your changes will then go into the payment processing queue.
5. **To remove** a payment, adjustment, patient responsible or allowed amount – click that line, delete the value in the amount field, and then preview.

## ERA's in Payment Posting

### ERA Lookup

The payment application now has a new menu item that allows you to lookup your ERA's – this opens a new form with similar functionality to our web portal ERA payments page, and so should be a bit familiar.



1. As before, you will see a red alert about items needing attention, and the search by date range or check/claim number. Practice managers will be able to modify the user name who is assigned to ERA payments

This practice has remittance advices requiring followup. Please run the following views for details:  
Posted, Pending Review  
Unprocessed ERAs

User for Pmts: . Maribel All batches posted from ERAs will be assigned to this user

Assign To Selected

Lookup

Unprocessed ERAs  
 Posted, Pending Review  
 Find ERA by check or claim number  
 Find ERA by date range

Refresh ERA List

<input type="checkbox"/>	Payor Name	Check #	Date Uploaded	# of claims	\$ Payment	User	Batch
<input checked="" type="checkbox"/>	BLUE CROSS BLUE SHIEL...	0058316677	9/5/2008 ...	6	798.14	. Maribel	3497042
<input type="checkbox"/>	BLUE CROSS BLUE SHIEL...	0809040593	9/5/2008 ...	1	0	. Maribel	3497043
<input type="checkbox"/>	BLUE CROSS BLUE SHIEL...	0067587092	9/5/2008 ...	21	1424.85	. Maribel	3497044
<input type="checkbox"/>	BLUE CROSS BLUE SHIEL...	170063260	9/5/2008 ...	6	312.09	. Maribel	3497046
<input type="checkbox"/>	BLUE CROSS BLUE SHIEL...	200254108	9/5/2008 ...	57	3713.48	. Maribel	3497047
<input type="checkbox"/>	BLUE CROSS BLUE SHIEL...	200114199	9/5/2008 ...	2	241.72	. Maribel	3497048

Release selected

2. As on the batch lookup form, you can do a bulk release or batch combine by using the checkboxes
3. Select the 'do not post' button if you want to remove the auto-posted payment and post it manually

4. The Check/EFT button displays other details from the ERA file header.

### Posting from ERA's

The ERA posting functionality for those that are "Posted, Pending Review" provides the following;

- A reminder label if the payment does not balance
- A method to post manually for single claims – can be used if the patient or claim was not identified by auto-post, or you have a rabid dislike for what the auto-post did.
- An ERA/EOB type layout with color coding for the items that auto-posted to help easily identify items needing review, and posting fields to make it easy to modify or add items
- A filter to narrow down to only the unposted details
- Printing the ERA – either for one or a selected group of claims, or all at once

What does it look like? Page down

Payment

Batch Payment

Batch ID: 3497047 Started: 09/06/2008 Released: Batch By: mfigueroa Posted: \$3,713.48 Batch Proof: \$3,713.48

Payment: Amount: \$3,713.48 Check/Ref #: 200254108

General Posted Details ERA Details Patient: -- All patients --

status: hold

Show only unposted details  Select all claims for printing

Total payment amount: \$3,713.48 Date received: 09/04/2008 Remittance #: 200254108 Check/Ref #: 200254108 Accounting date: / /

Print

Pat Name: MOONEY, ROBERT, G Pat Acnt#: IR10490 Pat HIC: Payor ICN: Q100000115431119 Claim Status: Processed as Primary ClaimID: 1855656

DOS From	DOS To	CPT	Remark	Charges	Allowed	Deduct	Coins	Adj Code	Adj Amnt	Payments	Other Pmts	Other Adj	New Bal
08/28/2008	08/...	99214		\$184.00	\$91.88	-\$91.88		CO 45	-\$92.12	\$0.00	-\$15.00	\$0.00	\$76.88
Pt Resp	\$0.00	Claim Totals		\$184.00	\$91.88	-\$91.88	\$0.00		-\$92.12	\$0.00			

Print

Pat Name: ESTES, FAYE, D Pat Acnt#: IR15087 Pat HIC: Payor ICN: Q100000115201432 Claim Status: Processed as Primary ClaimID: 1853183

DOS From	DOS To	CPT	Remark	Charges	Allowed	Deduct	Coins	Adj Code	Adj Amnt	Payments	Other Pmts	Other Adj	New Bal
08/27/2008	08/...	99214		\$184.00	\$91.88		-\$20.00	CO 45	-\$92.12	-\$71.88	-\$20.00	\$0.00	\$0.00
Pt Resp	-\$2...	Claim Totals		\$184.00	\$91.88	\$0.00	-\$20.00		-\$92.12	-\$71.88			

Debtor: Transaction: Amount:

Remarks: Save Changes

Adjustments: \$6,710.79 Refunds: \$0.00 Payments: -\$3,713.48

1. Check 'only unposted' to filter to only those items which did not post. Select all for printing will check all the 'Print' boxes
2. Check those you want to print, and click the print button up top
3. The amounts and dates that display here can be edited if needed – click Edit on the top toolbar, and then make your changes on the General tab as you would for regular batch posting
4. These 'scroll' buttons will auto scroll to the next claim payment, and we put them at the top and bottom of the form to make them close to where your cursor will be when you need them
5. The ERA/EOB view –all the items from the payment, with color coded cells (more below) – **put your cursor over the adjustment code or a colored cell for more detail**
6. Totals for other payments and adjustments which have previously been posted to the line item, and the 'New Bal' cell reflects the balance as it will be if the pending items are saved
7. Payment posting fields that allow you to modify, remove or add items
8. Navigation buttons – active if it is a large ERA which has multiple 'pages'
9. Post manually – use if Claim ID in blue label is 'unknown' (more below)

## How to use this page

### Color coding

If an item has posted, the cell will be green or orange. Point at it for more detail – and if you click on the cell, the posting fields at the bottom will display what has posted. You can then make a change, or select 'do not post' if needed.

If a cell like an adjustment is yellow, it means it has not posted, and you can click it to select the adjustment or denial code you need.

If you have a tricky one, and want to see all the items posted to that patient – use the 'Patient' drop down in the top right corner, and then review the details on the 'Posted Details' tab.

	The item has posted
	Has not posted – if in the balance cell, it means the balance has not been transferred.
	An adjustment is shown or taken, but there is no payment
	There are adjustments, but no payment

Payment: Amount: \$3,713.48 Check/Ref #: 200254108

Patient: -- All patients --

### Post Manually

This button will flip you into 'normal' payment posting mode, but with the addition of a **movable** panel that displays the ERA details.

The patient account number will be pulled from the ERA detail – if it is wrong (which can happen if it was a paper claim and the payer's folks keyed it in badly) you can give it some help with the find button.

Then post normally – this will add items to the same check details and totals to help you balance.

When you are done, click the X in the



top right, and this will return you to your ERA where you can continue ERA posting.

Click X to close and return to the ERA details when manual posting complete.

Pat Name: MOONEY, ROBERT, G Pat Acnt#: IR10490 Pat HIC: [REDACTED] Manually Posted  
 Payor ICN: Q100000115431119 Claim Status: Processed as Primary ClaimID: 1855656

DOS From	DOS To	CPT	Remark	Charges	Allowed	Deduct	Coins	Adj Code	Adj Amnt	Payments	Other Pmts	Other Adj	New Bal
08/28/20...	08/...	99214		\$184.00	\$91.88	-\$91.88		CO 45	-\$92.12	\$0.00	-\$15.00	\$0.00	\$76.88
Pt Resp	\$0.00	Claim Totals		\$184.00	\$91.88	-\$91.88	\$0.00		-\$92.12	\$0.00			

Payment Detail: A/C #: IR10490 Date of Service: / / (filter by date) Find

Patient Information: Patient Name: OBERT Insurance Plans: BCBS OF FLORIDA(primary) Total OS Bal: \$224.28 Patient: \$0.00 Ins: \$224.28 Indus A/C: \$0.00 Collections OS: \$0.00 Collections W/O: \$0.00 Unapplied Ins pmts: \$0.00 Unapplied Pat pmts: \$0.00

Patient Claim Details: All Claims

Claim #(...)	Provider	DOS	CPT	Charged	Paid	Unapplied	Balance	Debtor	Claim line remarks
1827157(1)	DALILI, CURTIS	08/12/20...	99214	\$184.00	-\$36.60		\$55.28	BCBS OF FLORIDA	
1855656(1)	DALILI, CURTIS	08/28/20...	99214	\$184.00	-\$15.00		\$169.00	BCBS OF FLORIDA	

Debtor: Transaction: Allowed: Adjusted: Pt Resp: Paid: Bal:

Post one detail at a time: Transaction: DR/CR Amount:

Posted Details: Remarks: Add Remove

Patient A/C#	Claim #(line)	Provider	DOS	CPT	Trans Desc
IR23651 (ADKINS, GABRIEL)	1706868(1)		6/2/2008	99204	Payment 1 - Insuran
IR23651 (ADKINS, GABRIEL)	1706868(2)		6/2/2008	93000	Payment 1 - Insuran
IR23651 (ADKINS, GABRIEL)	1717432(1)		6/6/2008	36415	Payment 1 - Insuran
IR23651 (ADKINS, GABRIEL)	1730952(1)		6/16/2008	99214	Payment 1 - Insuran

Adjustments: \$6,802.91 Refunds: \$0.00 Payments: -\$3,713.48

## Saving an ERA

When you are done – click the Edit button on the toolbar (if not already done), then save or hold as you normally would.

## History form 'go to payment'

Note that this now will detect if the payment in question was posted on an ERA, in which case it will show you the ERA view of the payment. This could come in handy if you have printed a secondary claim and want to print the ERA – go to the claim transaction detail form, use 'go to payment', and then use the ERA tab to print the ERA.

## Secondary claim balancing

If you manage the EDI rejections or EDI claim errors in PA, you will most likely have bumped into the annoying 'Claim cannot be submitted as payments + adjustments + patient responsible not = charges' message.

This is thanks to the new HIPAA format secondary claim EDI rules, and, sorry, there is nothing we can do to bend them for you. BUT, we have now made it easier for you to avoid this problem!

If you are saving a claim to secondary, or payment posting and transfer the balance, you will now receive a warning if your line item is out of balance.

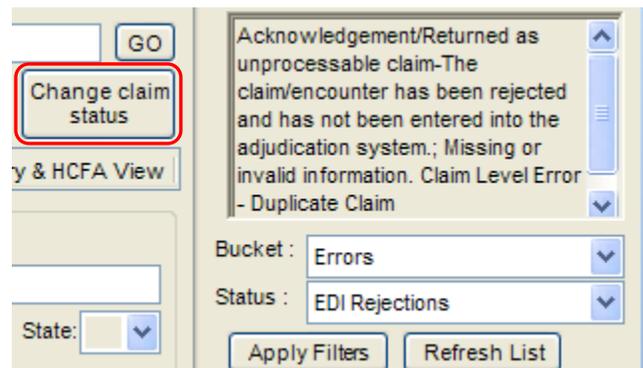
AND, thanks to the new history form 'posting' fields, you can now more easily go and fix the trouble.

Remember, when doing this, the relevant payments/adjustments/patient responsible and allowed items HAVE to be linked to the primary debtor on the claim. If they were incorrectly posted, pull them up on the history form, change the debtor and resave them.

## Change claim status

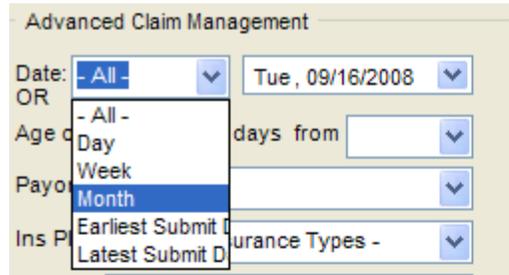
If you have a bogus rejection, or the payer has agreed to reprocess your claim, you can use this button to update the claim and mark it as being 'confirmed' without resaving it.

When this is done, a note will automatically be added to the claim/account to maintain the history.



## Bulk rebill

This can now be done using our sneaky new bulk rebill button in the bottom right of the claim form, which you can use in conjunction with the 'Today' filters.



Patient Acct Number. If you don't have this, tab to the Last Name field. To add a new patient, click on the [+] button to the right of the Last Name field.

Bucket : Submitted  
Status : Submitted by EDI

Apply Filters Refresh List

Name	DOS	Cl
ARISPE, RONNIE	09/03/2008	18
ARSENALUT, B...	09/03/2008	18
AUSTIN, JAMES	09/03/2008	18
BACHSCHMID, ...	09/03/2008	18
BARRETT, SIDN...	09/03/2008	18
BARRETT, SIDN...	09/03/2008	18
BERNARD, MIC...	09/03/2008	18
BERRUQUIN, JE...	09/03/2008	18
BIRDSONG, ED...	09/03/2008	18
BOLTON, GLO...	09/03/2008	18
BRONSTIEN, VI...	09/03/2008	18
BROWN, JANET	09/03/2008	18
BROWN, LAURIE	09/03/2008	18
BROWN, PATRI...	09/03/2008	18
BRUCE, RICHARD	09/03/2008	18
CONNER, EARL	09/03/2008	18
COODY, DIANE	09/03/2008	18
CRISP, CHARLES	09/03/2008	18
DANAHY, MARI...	09/03/2008	18

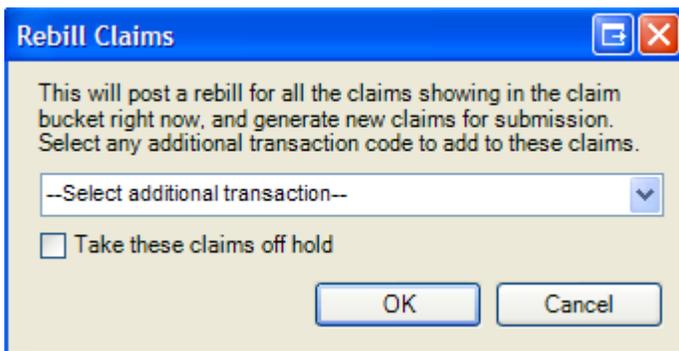
#Clms 91 Print  
OS Bal Bulk Rebill

Bulk rebill works on claims which have been released, and are showing in the claim bucket

This will allow you to identify a group of claims by payer, bucket etc. (And yes, before you say it, we will come up with a date range in the advanced claim management area.)

For now, note that you can use this date drop down to define a day, week or month – so in the example above - month would get all DOS in September, week would be 9/14 to 9/20.

When you have it narrowed down to your intended victims, click bulk rebill, and you will see this popup



If you select an additional transaction, it will be posted to each claim – and if you know some or all of the claims you are rebilling are currently on hold (blue in claim bucket) and you want that changed, check the box to have it also take them off hold for you.

Your claims will show up in a few minutes after they process.

## Other fixes and changes

**NPI Lookup** - Referring provider lookup now shows NPI's, and you can search by NPI

**Emergency service indicator** on claim detail form

**Canadian "zip codes"** – those occasional Canadian addresses no longer have to frustrate you.

**Edit on claim release for referring provider NPI** – prevents claims being saved without a referring NPI

**Supervising provider** field on claim general now allows you to bill for a 'needs supervision' provider without selecting a supervising provider (applicable to some CRNA anesthesia billing)

**Claim general claim payer** defaults to insurance if this exists

**Create batches with negative amount** is now possible